

LISTING OF THE CLAIMS

1. (Currently Amended) A method for automated management and standardization of performance information associated with at least one business comprising:

obtaining a trial balance report containing performance information associated with a business, the performance information originating from an accounting system used by the business, and storing the trial balance report as electronic data on a data processing system, the performance information in the trial balance report having a first format based on a first set of performance classifications;

converting, using an automated process executing on the data processing system, the performance information in the trial balance report from the first format to a second standardized format based at least in part on a mapping-conversion map associated with the business, the conversion map defining a correspondence between ~~of one or more performance classifications of the first set of performance classifications to one or more respective performance classifications of a second set of standardized~~ performance classifications;

aggregating the converted performance information with performance information associated with at least one other business, thereby creating a standardized database of private company performance information ~~across a receiving institution's portfolio that comports with generally accepted accounting principles;~~

analyzing the converted performance information associated with the business based at least in part on one or more performance metrics; ~~and~~

generating at least one electronic report based on the results of the analyzing for the business whose performance information was obtained; and

automatically providing at least a portion of the at least one electronic report to at least one requesting party.

2. Cancelled.

3. (Currently Amended) The method as in Claim ~~21~~, wherein the ~~one or more~~ at least one electronic performance reports includes at least one alert indicator to identify at least one performance metric of the converted performance information having a variance from a corresponding predetermined value that exceeds an adjustable threshold associated with the at least one performance metric.

4. (Original) The method as in Claim 3, wherein the predetermined value includes a value of the performance metric from a previous period.

5. (Original) The method as in Claim 3, wherein the predetermined value includes a target value set for the at least one performance metric.

6. (Original) The method as in Claim 3, wherein the predetermined value includes a value representative of an industry average for the at least one performance metric.

7. (Currently Amended) The method as in Claim 1, further comprising the steps of:

obtaining a trial balance report containing performance information associated with a second business, the performance information having a third format based on a third set of performance classifications;

converting, using an automated process, the performance information associated with the second business from the third format to the second format based at least in part on a conversion mapping map defining a correspondence between ~~of one or more~~ performance classifications of the third set of performance classifications ~~to~~ and one or more respective performance classifications of the second set of performance classifications;

aggregating the converted performance information associated with the second business with the other aggregated performance information; and

analyzing the converted performance information associated with the second business based at least in part on one or more performance metrics.

8. (Currently Amended) The method as in Claim 7, further comprising:

generating ~~one or more performance reports~~ at least one electronic report based on results of the analysis of the converted performance information associated with the second business.

9. (Previously Presented) The method as in Claim 7, further comprising:
analyzing at least one performance metric of at least one of the first and second businesses based on one or more representative performance metrics from the aggregated converted performance information.

10. (Previously Presented) The method as in Claim 1, wherein obtaining the trial balance includes receiving the performance information as one or more data files uploaded via a website.

11. Cancelled.

12. (Currently Amended) The method as in Claim ~~11~~ 1, wherein the ~~one or more performance reports~~ at least one electronic report ~~are~~ is provided via a website.

13. (Original) The method as in Claim 1, wherein the conversion of the performance information from the first format to the second format is performed at least in part using one or more software programs.

14. Cancelled.

15. (Original) The method as in Claim 1, wherein the business is one of a group consisting of: a private business; a public business; a non-profit organization; and a government agency.

16. (Currently Amended) The method as in Claim 1, further comprising:
providing at least one alert to the at least one requesting party, the alert identifying at least one performance metric of the converted performance information having a variance from a corresponding predetermined value that exceeds an adjustable threshold associated with the at least one performance metric set by the requesting party.

17. (Original) The method as in Claim 16, wherein the predetermined value includes a value of the performance metric from a previous period.

18. (Original) The method as in Claim 16, wherein the predetermined value includes a target value set for the at least one performance metric.
19. (Original) The method as in Claim 16, wherein the predetermined value includes a value representative of an industry average for the at least one performance metric.
20. (Original) The method as in Claim 16, wherein the alert is delivered via at least one of a group comprising: an email; a facsimile; a voice message; and a text message.
21. (Currently Amended) The method as in Claim 1, further comprising:
delivering at least a portion of the converted performance information to a requesting party as one or more data files having a format compatible with software operated by the at least one requesting party.
22. (Original) The method as in Claim 1, wherein the performance information includes financial information and where one or more of the performance classifications of the first set of performance classifications includes a financial account and one or more of the performance classifications of the second set includes a financial account correlated to a financial account of the first set.
23. (Original) The method as in Claim 1, wherein the performance information includes operational information and where one or more of the performance classifications of the first set of performance classifications includes an operational classification and one or more of the performance classifications of the second set includes an operational classification correlated to a operational classification of the first set.
24. (Currently Amended) A method for automated management of performance information associated with at least one business, the method comprising:
obtaining a trial balance report containing performance information associated with a business, the performance information originating from an accounting system used by the business and including financial performance information associated with the business, as an electronic data file uploaded via a graphical user interface (GUI), the

performance information in the trial balance report having a first format based on a first set of performance classifications;

selecting at least one automated software program for the performance information associated with the business;

~~converting, using at least one automated software program associated with the GUI, the performance information in the trial balance report from the first format to a second standardized format based at least in part on a mapping between of the one or more performance classifications of the first set of performance classifications to and one or more corresponding performance classifications of a second set of performance classifications;~~

~~aggregating the converted performance information with performance information associated with at least one other business, thereby creating a standardized database of private company performance information across a receiving institution's portfolio that comports with generally accepted accounting principles;~~

~~analyzing, using at least one automated software program associated with the GUI, the converted performance information based at least in part on one or more performance metrics; and~~

~~displaying creating one or more at least one performance reports based on results of the analysis of the converted performance information via the GUI to the submitting business; and~~

providing the at least one performance report to at least one requesting party.

25. (Original) The method as in Claim 24, wherein the GUI includes one or more webpages of a website.

26. Cancelled.

27. (Original) The method as in Claim 24, wherein the business is one of a group consisting of: a private business; a public business; a non-profit organization; and a government agency.

28. (Currently Amended) The method as in Claim 24, further comprising:

providing a least one alert to the at least one requesting party via the website, the alert identifying at least one performance metric of the converted performance information having a variance from a corresponding predetermined value that exceeds an adjustable threshold associated with the at least one performance metric set by the requesting party.

29. (Original) The method as in Claim 28, wherein the alert is delivered from the website via at least one of a group comprising: an email; a facsimile; a voice message; and a text message.

30. (Currently Amended) The method as in Claim 24, further comprising:
delivering at least a portion of the converted performance information to at least one requesting party via the website as one or more data files having a format compatible with software operated by the requesting party.

31. (Original) The method as in Claim 24, wherein the performance information includes financial information and where one or more of the performance classifications of the first set of performance classifications includes a financial account and one or more of the performance classifications of the second set includes a financial account correlated to a financial account of the first set.

32. (Original) The method as in Claim 24, wherein the performance information includes operational information and where one or more of the performance classifications of the first set of performance classifications includes an operational classification and one or more of the performance classifications of the second set includes an operational classification correlated to a operational classification of the first set.

33. (Currently Amended) A network-based performance information management system for automated management of performance information associated with at least one private business, the system comprising:

means for a performance information receipt module obtaining that receives performance information uploads in the form of an electronic data file containing business performance information associated with a business performance information

~~associated with a business, the performance information originating from the business' general ledger accounting system and including financial performance information of the business, the performance information having a first format based on a first set of performance classifications;~~

~~automated means for converting~~ a mapping module, including a map database, that converts the performance information from the first format to a second standardized format based at least in part on a mapping ~~of~~ between one or more performance classifications of the first set of performance classifications ~~to and~~ one or more performance classifications of a second set of performance classifications, the mapping maintained in the map database;

~~a database module for storing the converted information means for aggregating the converted information with information associated with at least one other business thereby creating a standardized database of private company performance information across a receiving entity's financial portfolio that comports with generally accepted accounting principles;~~

~~automated means~~ an analysis module for analyzing the converted performance information based at least in part on one or more performance metrics; and

~~a performance report/alert generation module means for generating an electronic information dashboard for visualizing results of the analysis, the dashboard detailing at least one historical trend for one or more financial metrics associated with the at least one business for the at least business~~ at least one performance report based on results of the analysis module, the performance report/alert generation module providing the at least one performance report to at least one requesting party.

34. Cancelled.

35. (Currently Amended) The system as in Claim 34~~33~~, wherein the ~~one or more~~ at least one performance reports includes at least one alert indicator to identify at least one performance metric of the converted performance information having a variance from a corresponding predetermined value that exceeds an adjustable threshold associated with the performance metric.

36. (Currently Amended) The system as in Claim 3433, wherein the predetermined value includes a value of the performance metric from a previous period.
37. (Currently Amended) The system as in Claim 3433, wherein the predetermined value includes a target value set for the performance metric.
38. (Currently Amended) The system as in Claim 3433, wherein the predetermined value includes a value representative of an industry average for the performance metric.
39. (Currently Amended) The system as in Claim 33, ~~further comprising:~~
the performance information receipt module means for obtaining receiving a trial balance report containing performance information associated with a second business, the performance information having a third format based on a third set of performance classifications;
the mapping module ~~automated means for~~ converting the performance information associated with the second business from the third format to the second format based at least in part on a mapping conversion map defining a correspondence between ~~of~~ one or more performance classifications of the third set of performance classifications ~~to and~~ one or more respective performance classifications of the second set of performance classifications;
the database module ~~means for~~ aggregating the converted performance information associated with the second business with the other aggregated performance information; and
the analysis module ~~automated means for~~ analyzing the converted performance information associated with the second business.
40. (Currently Amended) The system as in Claim 39, ~~further comprising:~~
automated means for the performance report/alert generation module generating one or more performance reports based on results the analysis of the converted performance information associated with the second business.
41. (Currently Amended) The system as in Claim 39, ~~further comprising:~~

the database module ~~means for~~ aggregating the converted performance information associated with the first and second businesses; and

the analysis module ~~means for~~ analyzing a performance of at least one of the first and second businesses based on one or more representative performance metrics from the aggregated converted performance information.

42. (Currently Amended) The system as in Claim 33, wherein the performance report/alert generation module ~~means for obtaining the trial balance report~~ includes a website adapted to receive the performance information as one or more uploaded data files.

43. Cancelled.

44. (Currently Amended) The system as in Claim ~~43~~33, wherein the performance report/alert generation module ~~means for providing the one or more performance reports~~ includes a website adapted to provide the one or more performance reports as one or more webpages.

45. Cancelled.

46. (Original) The system as in Claim 33, wherein the business is one of a group consisting of: a private business; a public business; a non-profit organization; and a government agency.

47. (Currently Amended) The system as in Claim 33, the performance report/alert generation module ~~further comprising:~~

~~means for~~ providing at least one alert to at least one requesting party, the alert identifying at least one performance metric of the converted performance information having a variance from a corresponding predetermined value that exceeds an adjustable threshold associated with the at least one performance metric that is set by the requesting party.

48. (Original) The system as in Claim 47, wherein the predetermined value includes a value of the performance metric from a previous period.

49. (Original) The system as in Claim 47, wherein the predetermined value includes a target value set for the at least one performance metric.

50. (Original) The system as in Claim 47, wherein the predetermined value includes a value representative of an industry average for the at least one performance metric.

51. (Original) The system as in Claim 47, wherein the alert is delivered via at least one of a group comprising: an email; a facsimile; a voice message; and a text message.

52. (Currently Amended) The system as in Claim 33, the performance report/alert generation module~~further comprising:~~

~~means for~~ delivering at least a portion of the converted performance information to ~~at the~~ at least one requesting party as one or more data files having a format compatible with software operated by the requesting party.

53. (Original) The system as in Claim 33, wherein the performance information includes financial information and where one or more of the performance classifications of the first set of performance classifications includes a financial account and one or more of the performance classifications of the second set includes a financial account correlated to a financial account of the first set.

54. (Original) The system as in Claim 33, wherein the performance information includes operational information and where one or more of the performance classifications of the first set of performance classifications includes an operational classification and one or more of the performance classifications of the second set includes an operational classification correlated to a operational classification of the first set.

55. (Currently Amended) A system for automated management of performance information associated with at least one business, the system comprising:

one or more networked servers adapted to:

operate a website having one or more webpages;

obtain a trial balance report containing performance information

associated with a business, including financial performance information of that business originating from a general ledger accounting system used by the business, as an

electronic data file uploaded via one or more webpages of the website, the performance information having a first format based on a first set of performance classifications;

convert the performance information from the first format to a second standardized format based at least in part on a conversion map ~~mapping that maps a correlation~~ between one or more performance classifications of the first set of performance classifications ~~to~~ and one or more respective performance classifications of the second set of performance classifications;

aggregate the converted performance information with performance information associated with at least one other business to create a standardized database of private company performance information across a receiving institution's financial portfolio that comports with generally accepted accounting principles;

analyze the converted performance information based at least in part on one or more performance metrics; and

provide one or more performance reports of results of the analysis of the converted performance information for display to ~~the submitting business~~ at least one requesting party via the one or more webpages of the website.

56. Cancelled.

57. (Currently Amended) The system as in Claim 55, wherein the one or more networked servers are further adapted to:

obtain a trial balance report containing performance information associated with a second business as electronic data uploaded via one or more webpages of the website, the performance information associated with the second business having a third format based on a third set of performance classifications;

convert the performance information associated with the second business from the third format to the second format based at least in part on a conversion map ~~mapping that maps a correlation~~ between one or more performance classifications of the third set of performance classifications ~~to~~ and one or more respective performance classifications of the second set of performance classifications;

aggregate the converted performance information associated with the second business with the other aggregated performance information; and

analyze the converted performance information associated with the second business based at least in part on one or more performance metrics; and

provide for the display of one or more performance reports of results of the analysis of the converted performance information associated with the second business via the one or more webpages of the website for the second business.

58. (Original) The system as in Claim 55, wherein the business is one of a group consisting of: a private business; a public business; a non-profit organization; and a government agency.

59. (Previously Presented) The system as in Claim 55, wherein the one or more networked servers are further adapted to:

provide a least one alert to at least one requesting party via the website, the alert identifying at least one performance metric of the converted performance information having a variance from a corresponding predetermined value that exceeds an adjustable threshold associated with the at least one performance metric that is set by the requesting party.

60. (Original) The system as in Claim 59, wherein the alert is delivered from the website via at least one of a group comprising: an email; a facsimile; a voice message; and a text message.

61. (Original) The method as in Claim 55, wherein the one or more networked servers are further adapted to:

deliver at least a portion of the converted performance information to a requesting party via the website as one or more data files having a format compatible with software operated by the requesting party.

62. (Original) The system as in Claim 55, wherein the performance information includes financial information and where one or more of the performance classifications of the first set of performance classifications includes a financial account and one or

more of the performance classifications of the second set includes a financial account correlated to a financial account of the first set.

63. (Original) The system as in Claim 55, wherein the performance information includes operational information and where one or more of the performance classifications of the first set of performance classifications includes an operational classification and one or more of the performance classifications of the second set includes an operational classification correlated to a operational classification of the first set.

64.-99. Cancelled.

100. (Currently Amended) A method for automated management of private company performance information comprising:

obtaining a trial balance containing performance information associated with a private business, the trial balance comprising data taken from that business' general ledger accounting system and having a user-defined format based on a first set of performance classifications corresponding to a set of financial accounts;

converting, using an automated process executing on a data processing system, the performance information contained in the trial balance from the user-defined format to a standardized format based at least in part on a mapping process that correlates one or more one or more performance classifications of the first set of performance classifications and one or more respective performance classifications of a second set of standardized performance classifications;

aggregating the converted performance information with performance information associated with at least one other business thereby creating a standardized database of private company performance information across a receiving entity's financial portfolio that comports with generally accepted accounting principles;

analyzing the converted performance information based at least in part on one or more performance metrics; and

generating at least one electronic report based on the analyzing, wherein generating a report comprises generating a web page based analysis dashboard for visualizing results of the analyzing, the dashboard detailing at least one historical trend for one or more performance metrics associated with the business for the private business; and

automatically providing the at least one electronic report to at least one requesting party.

101. (Currently Amended) A network-based business performance information management system comprising:

a computer system accessible on a computer network and adapted to:

electronically receive at least one business performance information file from at least one business, the business performance information file containing financial statement information on the at least one business in first format specified by that business based on a first set of performance classifications corresponding to a set of financial accounts;

convert the information in the at least one business performance information file into a standardized format using a mapping process based on a conversion map that maps one or more performance classifications of the first set of performance classifications and a second set of standardized performance classifications;

aggregate the information with converted business performance information of at least one other business thereby creating a standardized database of private company performance information across a receiving entity's financial portfolio that comports with generally accepted accounting principles;

analyze the converted performance information based at least in part on one or more performance metrics; and

generate an alert if results of analyzing indicates that at least one performance metric of the converted performance information varies from a corresponding predetermined value by more than an adjustable threshold set by a recipient of the alert.

102. (Currently Amended) A method for gathering private company business performance information comprising:

electronically receiving a file containing trial balance information in a first format based on a first set of performance classifications corresponding to a set of financial accounts associated with a business ~~in a first format~~ at a remote computer system over the Internet;

converting the data in the file from the first format to a second standardized format using an automated conversion mapping process that correlates one or more one or more performance classifications of the first set of performance classifications and one or more respective performance classifications of a second set of standardized performance classifications;

aggregating the converted data in a database with converted data of other private companies thereby creating a standardized database of private company performance information across a receiving entity's financial portfolio that comports with generally accepted accounting principles; and

analyzing the converted performance information based at least in part on one or more performance metrics; ~~and~~

generating at least one report based on the results of analyzing for the submitting business; and

automatically providing the at least one report to at least one requesting party.